



PAPERLESS PROFORMA

STREAMLINE THE REVIEW PROCESS FOR IMPROVED CASH FLOW

Legal and professional services firms are finding that wasting resources is no longer an option in today's economy. Paperless Proforma™ is an intuitive, browser-based pre-bill distribution and mark-up solution that lets you reduce the chance of human error, speed the pre-billing process, and get invoices out the door faster.

Paperless Proforma can replace or supplement cumbersome and time-consuming paper-based proforma distribution and mark-up procedures for both fee earners and accounting staff. Fee earners can review proformas while out of the office without needing to transport confidential, printed documents, and the Web-based interface lets lawyers make changes online then send them back to accounting instantly. For staff members, Paperless Proforma is easy to learn as it mirrors accepted proforma mark-up conventions, and the ability to switch between fee earner profiles without entering and exiting the system increases ease of use.

Not only does Paperless Proforma improve the financial management time cycle, it provides sophisticated auditing, tracking, filtering, and reporting capabilities. Staff can now monitor the pre-bill process with at-a-glance viewing that gives them the information they need in order to track fee earner productivity and instantly learn the status of reports. In addition, management can view top-level statistics on open, submitted, and archived pre-bills to stay on top of productivity and profitability.

With Paperless Proforma you can move ahead to a more profitable future knowing that you are working with one of the world's leaders in providing professional services firms with the most innovative of business solutions. With more than 60 years of experience, Thomson Reuters Elite has the proven expertise to make it happen for you.

AN INNOVATIVE AND GLOBAL LEADER

Thomson Reuters Elite offers a complete enterprise business management solution to run all operational aspects of your firm, including business development, risk management, client and matter management, and financial management. Using our integrated suite of offerings enables you to increase visibility and streamline workflow, ultimately improving profitability and exceeding your clients' expectations.



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BENEFITS

- Simplify and expedite the proforma process for improved cash flow
- Minimize resource costs by reducing the paper usage within the pre-bill workflow
- Increase productivity with advanced features that allow for filtering, reporting, and scenario calculations
- Create audit trails of narrative and status changes for firm-wide auditing purposes

THE LATEST IN REVIEWING, TRACKING, AND REPORTING TOOLS

- Fee earners can run different scenario calculations to achieve the correct balance in compliance with the firm's billing policies
- Users can filter and group pre-bill work lists by date, status, clients, dollar amount, and much more
- Integration with eBillingHub allows users to validate for e-billing errors that might cause bills to be rejected, and correct them on the spot
- Audit trails can be created that allow for compliance with government regulations
- Fee earners are able to defer pre-bills directly to archives, reducing the steps in the process and reducing accounting's workload
- Administrative staff can easily switch between fee earner profiles without entering and exiting the system

- The number of pre-bill reports and the total financial value per fee earner in the firm can be monitored
- Reporting capabilities allow you to drill down into the details of specific pre-bills to learn who the owner is and its status
- Tracking tools enable you to track all narrative and status changes made to each pre-bill
- Interface mirrors traditional paper pre-bills, making the system easy to learn and use
- Updated document engine uses Design Gallery™ technology
- Unique productivity features help improve firm performance
- Sophisticated collaboration features, allowing fee earners to work together (either parallel or sequential) at the matter level
- Superior flexibility backed by configurable workflows, enabling the solution to work the way your firm works
- Built-in, configurable, and automatic approval routing

YOUR PARTNER FOR SUCCESS

Thomson Reuters Elite offers an end-to-end enterprise business management solution that allows law firms and professional services organizations to run all operational aspects of their firms, including business development, risk management, client and matter management, and financial management. As an industry leader for organizations across the globe, we understand the business and financial aspects of firm operations, and we have the tools to streamline processes, improve efficiencies, and provide the flexibility you need to change and grow your business.

To learn more about Paperless Proforma or for a global list of office locations, visit elite.com.

